Assessing Energy Management Systems for Best Practices
Adapted from: ENERGY STAR Facility Energy Management Assessment Matrix

Facility Name: Assessment Date:				
	Little or no evidence	**Some elements/degree**	**Fully implemented**	**Next steps**
1. Establish Organizational Commitment				
Site Energy Leader	None assigned	Assigned responsibilities but not empowered. 20-40% of the time is devoted to energy	Recognized and empowered leader having site manager and senior energy manager support	
Site Energy Champion	None identified	Senior manager implicitly supports the energy program	Senior manager actively supports the energy program and promotes energy efficiency in all aspects of site operations	
Site Energy Team	No site energy team	Informal organization with sporadic activity	Active cross-functional team guiding site energy program	
Energy Policy	No energy policy or awareness of organizational policy	Organizational policy in place. Little awareness by site energy team and limited application of policy	Organizational policy supported at site level. All employees aware of goals and responsibilities	
Site Energy Plan	No written plan	Informal plan but not widely known	Written formal plan endorsed, distributed, and verified	
Accountability	No energy budgeting and accountability	Estimates used for allocating energy budgets	Key users are metered separately. Each entity has total accountability for their energy use	
Participation levels	No reporting of energy performance data internally or involvement in external organizations	Some participation, sharing, mentoring, and professional memberships. Annual reporting of performance	Participates in energy network/organizations. Shares best practices/mentors other sites. Reports usage quarterly	
2. Develop a Baseline of Energy Use				
Track & Analyze Data	Limited metering or tracking. No demand analysis or billing evaluation	Some metering, tracking, analyzing, and reporting. Energy bills verified for accuracy	Key loads metered, tracked, analyzed, and reported. Facility peak demand analyzed. Adjusts for real-time demand	
Documentation	No manuals, plans, designed, drawings, specs, etc. for building and equipment available	Some documentation and records available. Some review of equipment commissioning specs conducted	Critical building and equipment documentation available and used for load surveys/recommissioning/ efficiency goals	
3. Evaluate the System and Collect Data				
Benchmarking	Energy performance of systems and facilities not benchmarked	Limited comparisons of specific functions, or only same-site historical comparisons	Key systems/sites benchmarked using comparison tools like Portfolio Manager/Energy Performance Indicators	
Technical Analysis	No formal or external reviews	Limited review by vendors, location, or organizational and corporate energy managers	Extensive regular reviews by multi-functional team or internal and external professionals. Full assessment every five years	

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Best Practices	None identified	Ad hoc or infrequent monitoring of trade journals, internal databases, and other facilities' best practices	Regular monitoring of trade journals, internal databases, and other facilities. Best practices shared and implemented	
4. Identify Energy Efficiency Opportunities				
Goals / Potential	Energy reduction goals not established	Loosely defined. Little awareness of energy goals by others outside site energy team	Potential defined by experience or assessments. Goals roll up to unite/site/corporate/organization and status posted prominently	
Energy Team Incentives	No ties between energy efficiency improvement and compensation	Spot awards or luncheons for employees on a project	Accountability tied to performance reviews, compensation, and personal and plant bonuses	
5. Prioritize Opportunities				
Projects Identified	No energy projects identified	Some projects identified, but not studied or prioritized	Energy projects have been identified, studied, and prioritized	
Evaluation Criteria	No criteria determined for proceeding with projects	Projects are pursued to meet one objective	Appropriate evaluation for non-monetary characteristics of energy efficiency opportunities identified	
6. Develop an Implementation Plan				
Improvement Planning	No upgrade plan	Upgrades implemented sporadically. Some compliance with organizational goals and standards	Upgrade plans established; reflect assessments. Full compliance with organizational EE design guidelines and goals	
Role and Resources	Not addressed or addressed on ad hoc basis	Informal interested person competes for funding. Little support from organizational program	Internal/external roles defined and funding identified. Organizational or corporate program support secured	
Site Planning Integration	Impact on energy from changes not considered	Decisions impacting energy considered on first-cost basis only	Projects/contracts include energy analysis. Energy projects evaluated with other investments. Lifecycle costing applied	
Communication Plan	Site plan not developed	Periodic communications for projects. Some reporting of energy use information	All stakeholders are addressed on a regular basis	
Energy Awareness	None conducted	Occasional energy efficiency awareness campaigns. Some communication of energy costs	Planned outreach and communications. Support organizational initiatives. Employees aware of site energy costs.	
Building Staff Capacity	No training offered	Some vendor training for key individuals and operators	Broad training and certification in technology and best practices. Networking opportunities actively pursued	
Contract Management	Contracts are renewed automatically without review	Occasional review of supplier contract	Energy-efficient procurement policy in place. Vendors for replacements on standby. Regular review of suppliers	
Incentives and Rebates	Not researched or pursued	Occasional communication with utility representatives. Limited knowledge of incentive program	Researches rebate and incentives offered regionally and nationally. Communicates with utility representatives often	

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Source: http://www.energystar.gov/index.cfm?=c=guidelines.guidelines_index

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7. Provide for Progress Tracking and Reporting				
Measuring Results	No reviews	Historical comparisons. Some reporting of results	Compare usage & costs vs. goals, plans, and other sites. Results reported to site and organizational or corporate management	
Reviewing Action Plan	No reviews	Informal check on progress	Revise plan based on results, feedback, and business factors. Best practices shared with other sites/organization or corporate program	
Site Recognition	Not addressed	Occasional recognition of projects and people	Recognition system in place. Awards for projects pursued by operators	
Organizational Recognition	Not sought	Occasionally when prompted by senior management	Senior management acknowledges site successes	
External Recognition	Not sought	Occasional trade magazine and vendor recognition	Government and third-party recognition highlighting achievements sought. ENERGY STAR label for facility awarded annually	